Crown Land Recreation Pilot Program

Crown Land Camping Evaluation

Ontario
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INTRODUCTION

Background

In many areas of Ontario, there is an increasing and unfair competition developing:

(1) between non-residents of Ontario and residents for popular Crown land camping sites;

(2) between non-residents and residents for fish and wildlife resources; and

(3) between non-residents camping freely on Crown land and the operation of Ontario tourist industry.

In November of 1982, the Minister of Natural Resources, Alan W. Pope, announced his intention to implement a number of new policies respecting the recreational use of Crown land by non-residents of the province. His primary objectives were:

(1) to recognize the priority the government places on the resident use of Ontario recreational resources;

(2) to stimulate and support the Ontario tourist industry and economic climate of local communities;

(3) to capture a reasonable economic rent for the use of our natural resources; and

(4) to conserve and manage fish and wildlife populations.

To achieve these objectives the Minister suggested a number of proposals for implementation. To date the following proposals have been approved and implemented:

(1) the provincial changes in the basic non-resident angling licence;

(2) the provincial requirement for non-residents to purchase specific permits to fish for muskellunge and lake trout;

(3) the requirement in a pilot area of Northwestern Ontario for non-residents wishing to hunt bear and deer to go through the Ontario tourist industry;

(4) the requirement in a pilot area in Northwestern Ontario for non-residents wishing to camp on Crown land to pay a daily fee of $3 per individual or $5 per family;

(5) the requirement in a pilot area in Northwestern Ontario to establish regulated camping zones whereby non-residents wishing to camp within these zones would be required to camp at commercial campgrounds or provincial parks;

(6) the transferring of Crown land camping opportunities in Northwestern Ontario to the private sector; and

(7) the introduction of a daily fee to control sport fishing by non-residents of Canada on Rainy Lake, Rainy River, and Lake of the Woods.

For the purposes of the above program, the pilot study area is defined as all of the Northwestern Region plus the administrative District of Atikokan. The objective of this report is to summarize our evaluation of the socio-economic and conservation impacts regarding the implementation of the camping component of the three-year Crown Land Recreation Pilot Program within the Northwestern Ontario study area.

CROWN LAND CAMPING COMPONENT DETAILS

Effective May 1984, non-residents of Canada seventeen years of age and older are required to pay a $3.00 daily fee for a permit to camp on Crown land in a special study area in the Northwestern part of the province. A family camping permit is also available for $5.00 per day, and covers husband and wife and children under seventeen years of age.

Non-residents who are guests of Ontario tourist establishments or air carriers who offer overnight canoeing or camping trips or provide air transportation do not need these special camping permits. The program does not apply to non-resident owners of property in the study area and their immediate family.

In addition, non-residents are required to camp at commercial campgrounds or provincial parks in specially zoned portions of the study area. A number of popular Crown land camping sites generally associated with these regulated camping zones have been offered for disposition to the private sector to operate as new business opportunities.

PURPOSE OF REPORT

The purpose of this report is to evaluate the socio-economic and conservation impacts regarding the implementation of the camping component of the Crown Land Recreation Pilot Program within the Northwestern Ontario study area. This report examines the Crown land camping component in view of its potential for broad or comprehensive impact on the tourist industry.

The evaluation of the impact of the new camping regulations on the tourist industry is achieved by:

(a) a review of border crossing data;
(b) a tourist industry accommodation survey during 1984, 1985 and 1986;
(c) a review of provincial park use;
(d) a review of creel survey data on major Northwestern Region fishermen;
(e) a non-resident provincial angler survey conducted during 1983, 1984 and 1985; and
(f) surveys of non-resident Crown land campers during 1984 and 1985.

Each of the elements of the camping component will also be evaluated on an individual basis:

(a) Crown land camping,
(b) regulated camping zones, and
(c) privatization of popular camping sites.

GENERAL ANALYSIS

Border Crossings

As indicated in Figure 1, the number of incoming United States autos entering the pilot study area at Rainy River declined from 1982 to 1985 and increased slightly during 1986. During the months of May, June, July, and August, incoming U.S. autos declined eight percent during 1983, 13 percent during 1984, 2 percent during 1985, and increased seven percent during 1986.

The number of incoming United States autos entering the pilot study area at Fort Frances declined from 1982 to 1985 and increased slightly during 1986. During the months of May, June, July and August, incoming U.S. autos declined three percent during 1983, five percent during 1984, one percent during 1985 and increased 4 percent during 1986.

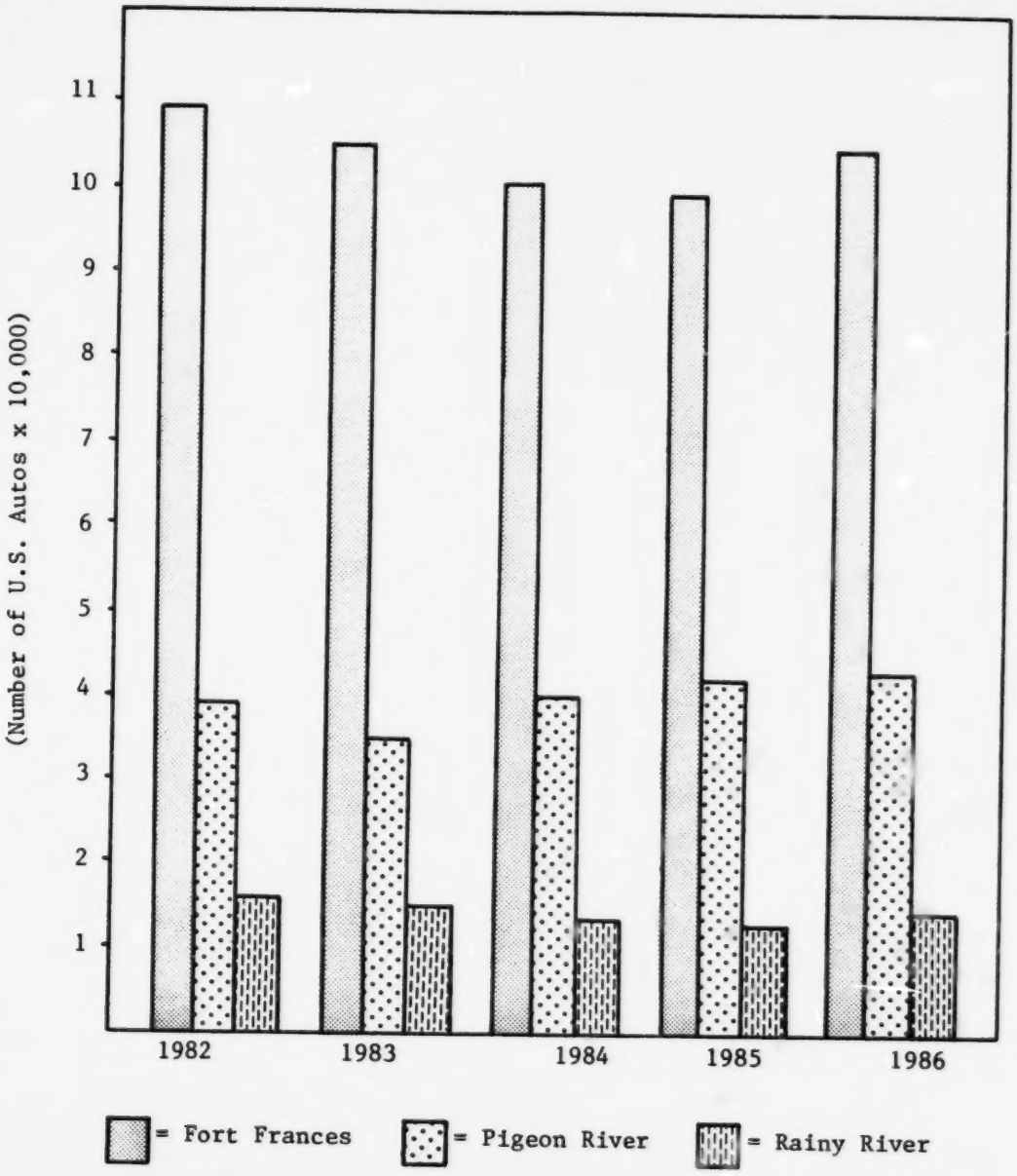
The number of incoming United States autos entering Northwestern Ontario at the Pigeon River border crossing continued to increase slightly since 1984. During the months of May, June, July and August, incoming U.S. autos declined seven percent during 1983 and increased 10 percent during 1984, four percent during 1985 and one percent during 1986.

Given the complexity of variables which influence travel patterns, it is difficult to ascertain whether or not the new program regulations had any measurable impact on the numbers of border crossings during the pilot program period. What is evident however, is that the previous declines in border crossings at both Rainy River and Fort Frances since 1982 have reversed during 1986. The Pigeon River border crossing continues to experience slight increases in the number of incoming U.S. autos since 1983.

Figure 1

Incoming U.S. Autos at the Fort Frances,
Pigeon River and Rainy River Border Crossings*

1982 - 1986



* Includes all incoming U. S. autos (tourist traffic and other) during the months of May, June, July, and August.

Tourist Industry Accommodation Survey

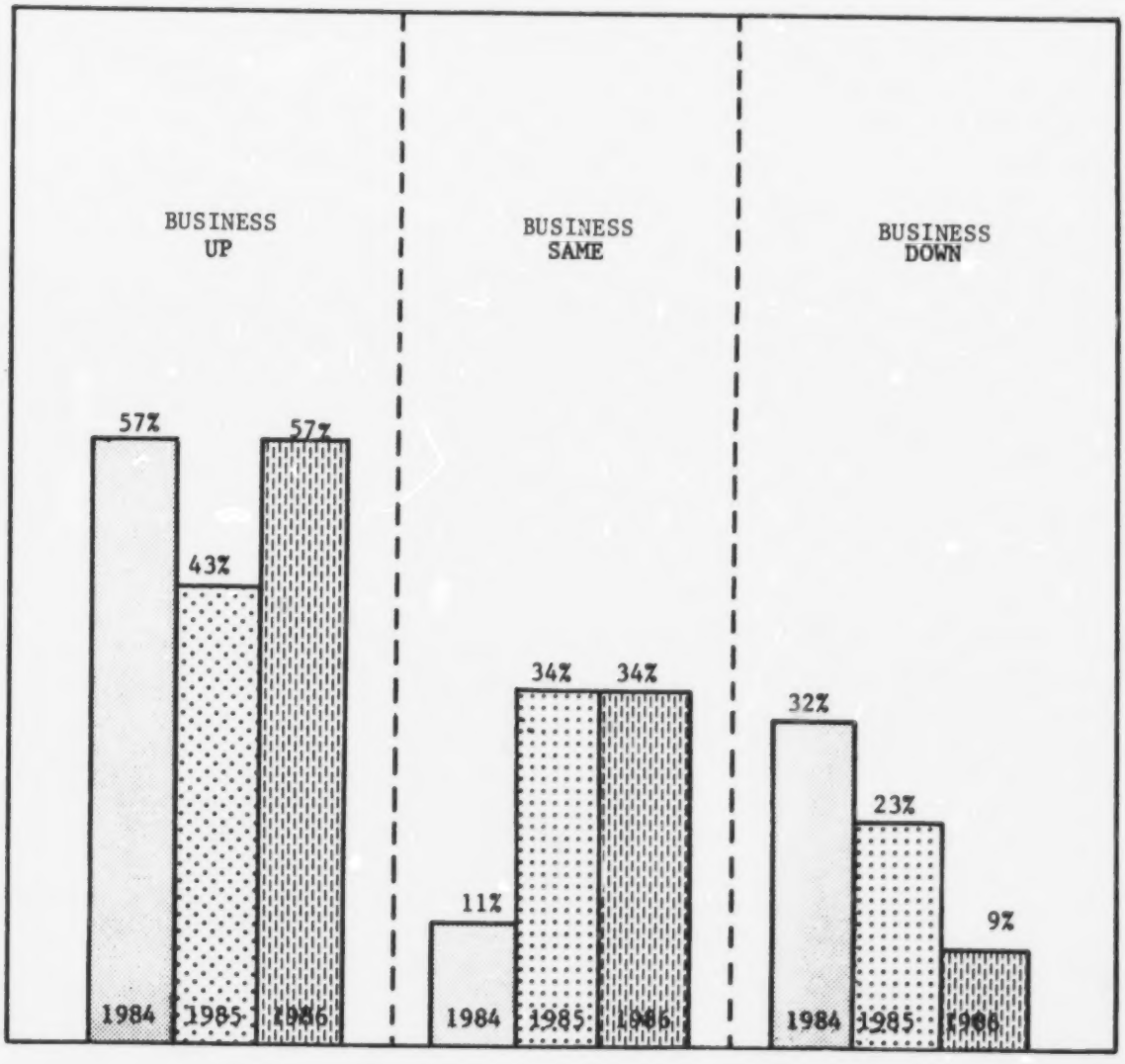
A random telephone survey of thirty-five accommodation-based (campsites, cabins, lodges, etc.) tourist establishments located within the pilot study area was carried out during the fall of 1984, 1985 and 1986. The same 35 tourist establishments were contacted during each year of the survey. This survey was conducted to determine if accommodations were up, the same, or down from the previous year's level. The results of this survey are outlined within Figure 2.

Approximately 57 percent of the 35 tourist establishments surveyed during 1984 indicated that accommodations were up over last year. This compares to 43 percent and 57 percent of the same tourist establishments surveyed during 1985 and 1986 respectively. Approximately 11 percent of the 35 tourist establishments surveyed during 1984 indicated that accommodations were the same as last year. This compares to 34 percent of the same tourist establishments surveyed during both 1985 and 1986. Approximately 32 percent of the 35 tourist establishments surveyed during 1984 indicated that accommodations were down over last year. This compares to 23 percent and nine percent of the same tourist establishments surveyed during 1985 and 1986 respectively.

In summary, it is difficult to ascertain whether or not the new program regulations had any impact on tourist industry accommodations in a general sense. However, in specific instances, tourist operators indicated that the new regulations actually increased the level of accommodations at their establishments. As indicated by Figure 1, tourist accommodations appear to be increasing at a healthy rate while the number of tourist establishments experiencing lower levels of accommodation steadily declined from 1984 to 1986.

Figure 2

TOURIST ACCOMMODATION INDUSTRY GROWTH
1984 - 1986



* Based on a random telephone survey of 35 establishments within the study area.

Provincial Park Use

As indicated by Figure 3, the number of camper nights within Ontario Provincial Parks remained relatively stable during the last five years. The number of camper nights within the total Province decreased slightly from approximately 3.7 million during 1985 to 3.6 million during 1986. The number of camper nights within the Northwestern Region increased slightly from approximately 133,000 during 1985 to 140,000 during 1986.

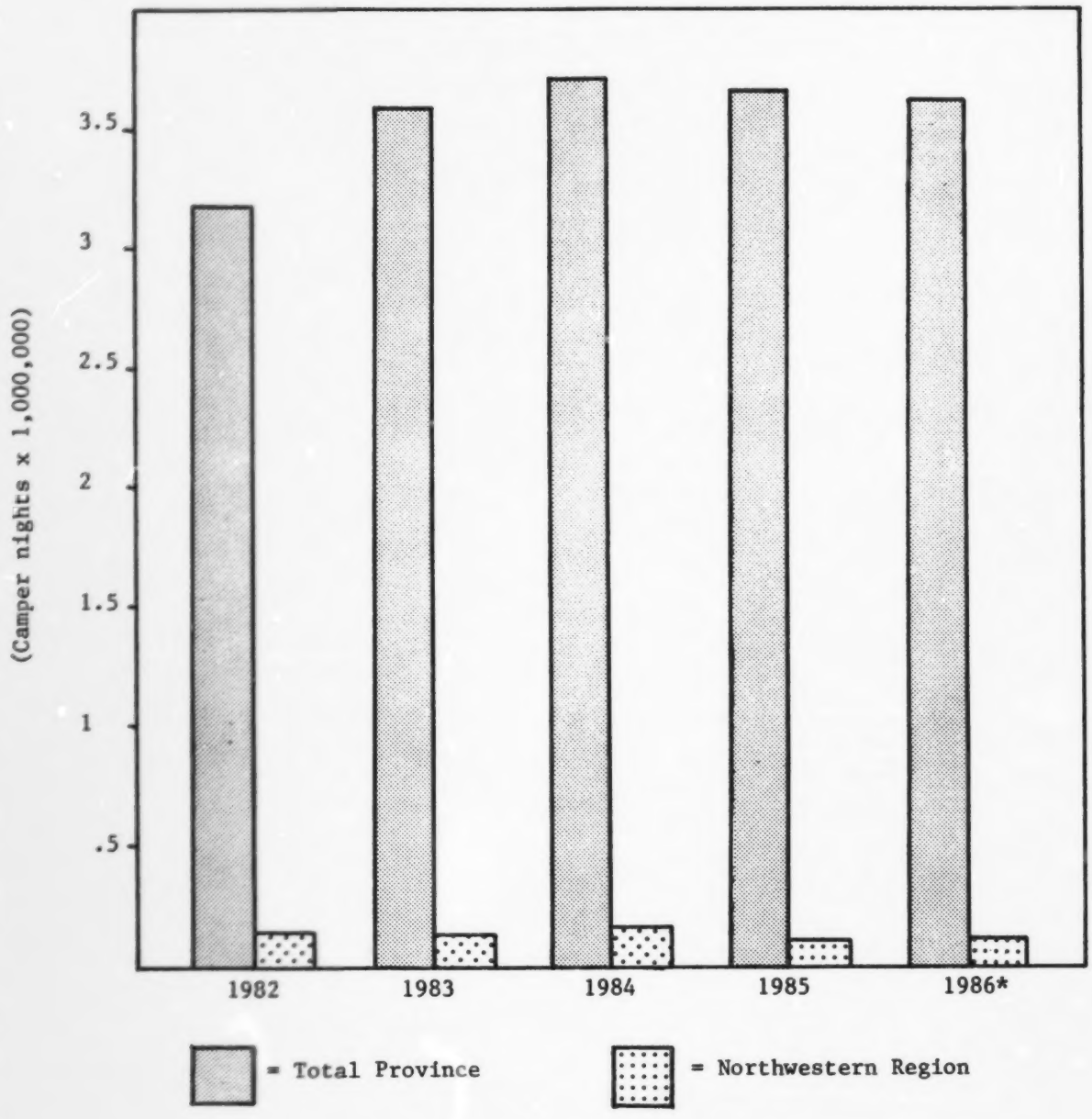
It would appear that the introduction of the new Crown land camping regulations had little, if any, impact on the number of Provincial Park camper nights within the Northwestern Region. Past experience would tend to suggest that other factors play an important role (ie. weather, gasoline prices, etc.) in park visitation rates. Camper nights declined by 13 per cent during 1985 largely as a result of a very cold and wet summer camping season.

Figure 3

Provincial Park Camper Nights

Total Province and Northwestern Region

1982 - 1986



Lake of the Woods Creel Survey

A creel survey was conducted on Lake of the Woods, the most significant non-resident sports fishery in the Province, during the period May - September from 1983 - 1986. Table 1 outlines a summary of angling effort (man hours) by non-resident anglers utilizing a Canadian commercial tourist base of operations on the lake. As indicated, angling effort by this user group continued to increase steadily from 1983 to 1986.

In summary, Canadian-based commercial tourism on Lake of the Woods has continued to experience healthy increases in the number of non-resident anglers utilizing their facilities. The introduction of the Crown land camping regulations does not appear to have negatively impacted upon this tourism activity. On the other hand, the presence of the regulated camping zone on Whitefish Bay of lake of the Woods has directly increased benefits to the tourism industry within and adjacent to this zone as suggested by comments from tourist operators.

TABLE 1

LAKE OF THE WOODS CREEL SURVEY

A Summary of Angling Effort (Man hrs.) by Non-Resident Anglers
Utilizing a Canadian Commercial Tourist Base of Operations
On Lake of The Woods
May - Sept., 1983 - 1986

YEAR	ANGLING EFFORT (MAN HRS.)	
	ALL SECTORS	ALL SECTORS* MINUS 3 & 4
1983	472,841	224,214
1984	-	306,335
1985	735,272	419,137
1986	832,719	436,559

* Totals do not include data from two sectors on Lake of the Woods - Whitefish Bay and Sabaskong Bay. The Whitefish Bay and Sabaskong Bay sectors were not surveyed during 1984.

Rainy Lake Creel Survey

A creel survey was conducted on Rainy Lake, another significant tourist fishery within the Northwestern Region, during the period May - September from 1983 to 1986. Table 2 outlines a summary of angling effort (man hours) by non-resident anglers utilizing a Canadian commercial tourist base of operations on the Lake. As indicated, angling effort by this user group continued to increase slightly (a slight decline occurred during 1985) from 1983 to 1986.

In summary, Canadian-based commercial tourism on Rainy Lake has experienced slight increases in the number of non-resident anglers utilizing their facilities from 1983 - 1986. The introduction of the Crown land camping regulations does not appear to have negatively impacted upon this tourism activity.

TABLE 2

RAINY LAKE CREEL SURVEY

A Summary of Angling Effort (Man Hrs.) by Non-Resident Anglers
Utilizing A Canadian Commercial Tourist Base of Operations
On Rainy Lake
May - Sept., 1983 -1986

YEAR	ANGLING EFFORT (Man. Hrs.)
1983	105,471
1984	131,240
1985	94,736
1986	139,545

Non-Resident Provincial Angler Survey

A non-resident provincial angler survey was conducted for the total province and from 1983 to 1985. Tables 3-7 and Figures 4 and 5 summarize the results of this angler survey through a comparison of non-resident anglers within the province (minus the Northwestern Region) and the Northwestern Region. In addition, the number of anglers, days fished and expenditures of the non-resident Crown land camping angler within the Northwestern Region are examined for this same period.

As indicated within Table 3 and depicted graphically within Figure 4, the number of non-resident anglers within the Province (minus the Northwestern Region) increased by approximately 2 percent from 1983 to 1985. The number of non-resident anglers within the Northwestern Region decreased by approximately 7 percent during this same period. Non-resident angling days decreased by approximately 2 percent within the Province (-NWR) and 12 percent within the Northwestern Region from 1983 to 1985. Expenditures by non-resident anglers however, increased by approximately 29 percent within the Province (-NWR) and by 33 percent within the Northwestern Region during this three year period. This represents a net difference in expenditures of some 4 percent or 3.5 million dollars within the Northwestern Region compared to the rest of the Province.

As indicated within Table 4 and depicted graphically within Figure 5, the number of non-resident Crown land camping anglers within the Northwestern Region declined by approximately 29 percent or 2,600 anglers from 1983 to 1985. Similarly, the number of days fished by non-resident Crown land camping anglers within the Northwestern Region also declined by approximately 32 percent during this same period. Expenditures by this same user group however, increased by approximately 24 percent within the Northwestern Region.

As indicated within Tables 5, 6 and 7, the average expenditure per trip by the non-resident Crown land camping angler increased from 171 dollars during 1983 to 268 dollars during 1985 within the Northwestern Region. This increase in expenditures occurred in spite of an overall reduction in non-resident Crown land camping anglers during this period. As indicated within these three tables, average expenditures per angler on various service industry commodities such as food, boat rentals, fishing supplies etc. increased more within the Northwestern Region than the rest of the Province. For example, average expenditures on the above three service commodities increased by approximately 6 percent within the Province and 19 percent within the Northwestern Region from 1983 to 1984. From this analysis, it does not appear that the introduction of the Crown land camping program had a significant negative impact on the tourist service industry.

TABLE 3

NON-RESIDENT PROVINCIAL ANGLER SURVEY

1983 - 1985

Province (- Northwestern Region)

CATEGORY	YEAR 1983	1984	1985	PERCENTAGE DIFFERENCE 1983 - 1985
Number of Anglers	376,186	357,097 (-5%)	384,955 (+8%)	+2%
Days Fished	3,868,620	3,161,128 (-18%)	3,769,801 (+19%)	-2%
Expenditures	127,059,713	136,124,194 (+7%	164,212,423 (+21%)	+29%

Northwestern Region

CATEGORY	YEAR 1983	1984	1985	PERCENTAGE DIFFERENCE 1983 - 1985
Number of Anglers	239,864	229,343 (-4%)	222,710 (-3%)	-7%
Days Fished	1,875,575	1,629,788 (-13%)	1,655,390 (+2%)	-12%
Expenditures	90,767,521	110,048,655 (+21%)	120,590,923 (+10%)	+33%

FIGURE 4

NON-RESIDENT PROVINCIAL ANGLER SURVEY

A comparison of the Number of Anglers, Days Fished and Expenditures Within the Northwestern Region and the rest of the Province (1983-1985).

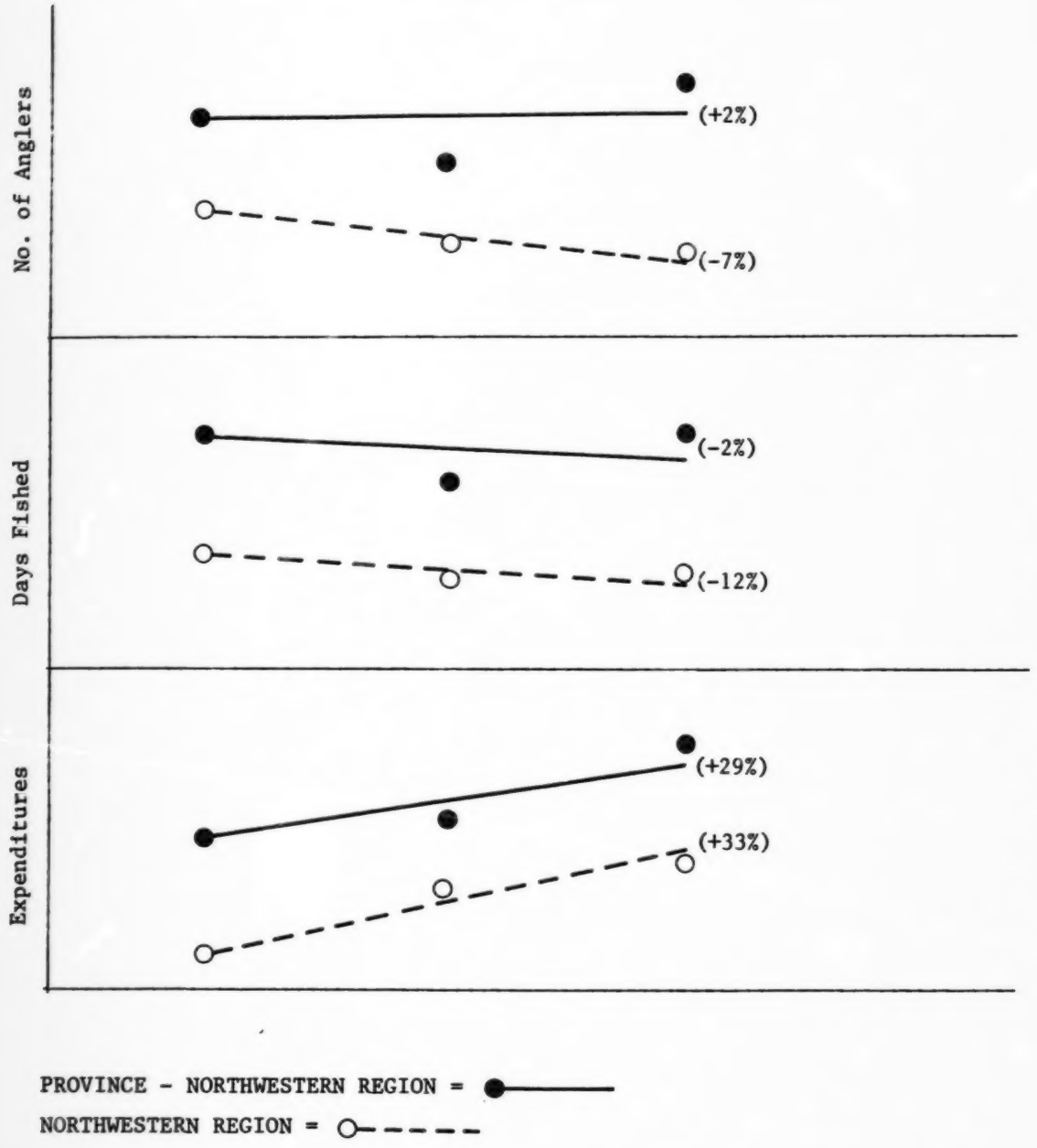


TABLE 4

NON-RESIDENT PROVINCIAL ANGLER SURVEY

Number of Anglers, Days Fished and Expenditures for Crown Land Camping Anglers within the Northwestern Region (1983 - 1985)

CATEGORY	YEAR			PERCENTAGE DIFFERENCE 1983 - 1985
	1983	1984	1985	
Number of Anglers	12,093	13,153 (+9%)	9,509 (-28%)	-21%
Days Fished	78,951	69,649 (-12%)	53,552 (-23%)	-32%
Expenditures	2,062,224	2,779,551 (+35%)	2,548,974 (-8%)	+24%

FIGURE 5

NON-RESIDENT PROVINCIAL ANGLER SURVEY

Number of Anglers, Days Fished and Expenditures for Crown Land Camping Anglers within the Northwestern Region (1983 - 1985).

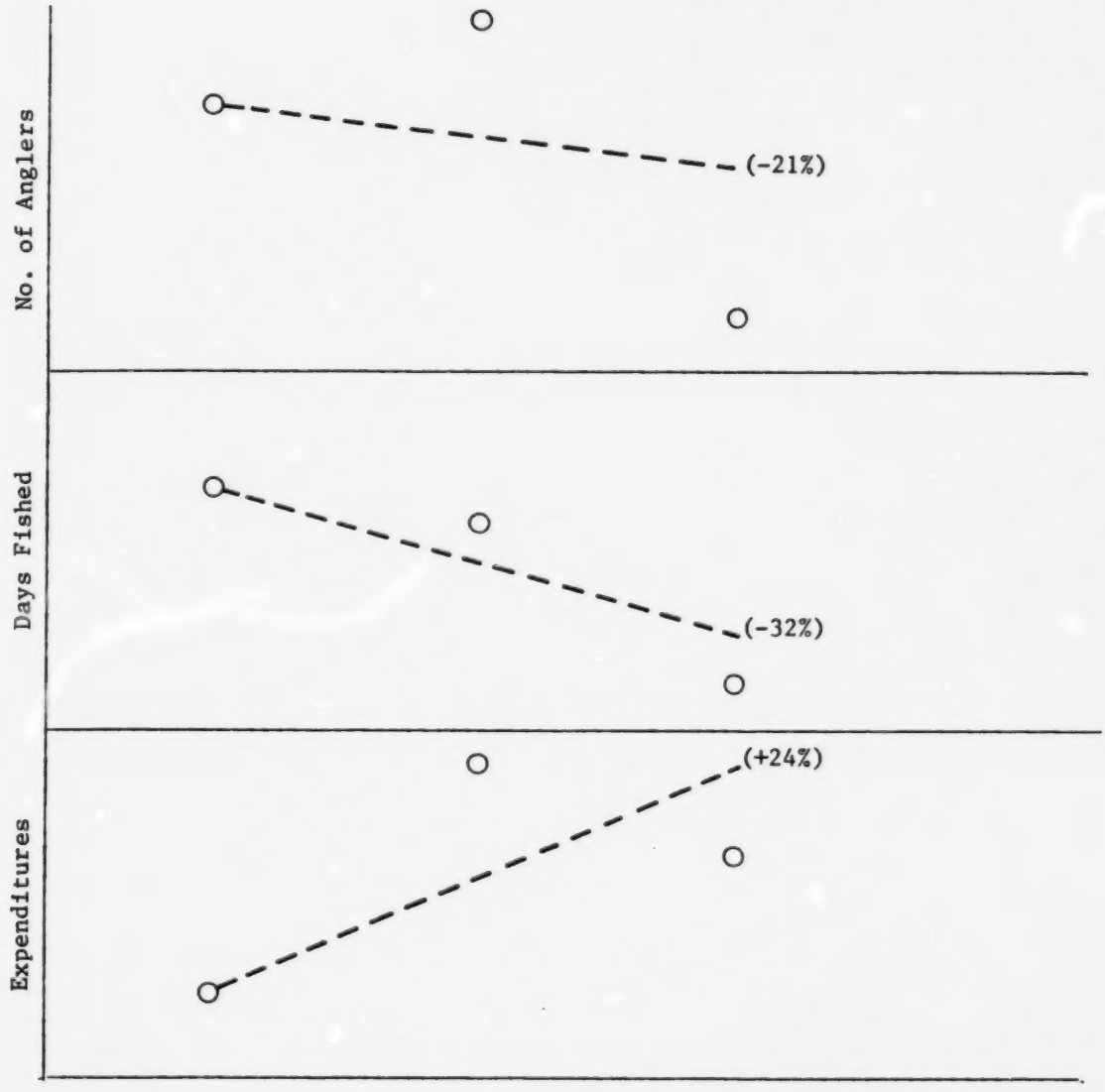


TABLE 5

1983 CROWN LAND CAMPING ANGLER EXPENDITURES

NON-RESIDENT PROVINCIAL ANGLER SURVEY

Expenditure Category	PROVINCE			NORTHWESTERN REGION		
	Avg/Expend. Angler	Total (000's)	% of All Expend.	Avg/Expend. Angler	Total (000's)	% of All Expend.
Package Tour/Lodging/ Campsite Fee	$11	$311	6%	$8	$101	5%
Food	75	2,213	41%	63	765	37%
Travel Costs	52	1,543	28%	47	570	28%
Boat Rentals		113	2%		56	3%
Fishing Supplies		247	5%		89	4%
Bait		200	4%		99	5%
Household Boat		344	6%		179	9%
Guide Services		7	0%		5	0%
Licence Fees	12	344	6%	12	140	7%
Other		122	2%		58	3%
TOTAL	$184	$5,444	100%	$171	$2,062	100%

TABLE 6

1984 CROWN LAND CAMPING ANGLER EXPENDITURES

NON-RESIDENT PROVINCIAL ANGLER SURVEY

Expenditure Category	PROVINCE			NORTHWESTERN REGION		
	Avg/Expend. Angler	Total (000's)	% of All Expend.	Avg/Expend. Angler	Total (000's)	% of All Expend.
Package Tour/Lodging/ Campsite Fee	$27	$847	13%	$50	$651	24%
Food	71	2,197	34%	64	835	30%
Travel Costs	51	1,569	23%	42	555	20%
Boat Rentals		258	4%		116	4%
Fishing Supplies		265	4%		128	5%
Bait		265	4%		109	4%
Household Boat		280	5%		125	5%
Guide Services		102	2%		4	0%
Licence Fees	15	447	7%	13	171	6%
Other		187	3%		46	1%
TOTAL	$207	$6,417	100%	$208	$2,740	100%

TABLE 7

1985 CROWN LAND CAMPING ANGLER EXPENDITURES

NON-RESIDENT PROVINCIAL ANGLER SURVEY

Expenditure Category	PROVINCE Avg/Expend. Angler	PROVINCE Total (000's)	PROVINCE % of All Expend.	NORTHWESTERN REGION Avg/Expend. Angler	NORTHWESTERN REGION Total (000's)	NORTHWESTERN REGION % of All Expend.
Package Tour/Lodging/ Campsite Fee				$42	$403	16%
Food				88	835	33%
Travel Costs				70	665	26%
Boat Rentals					43	2%
Fishing Supplies	NOTE: Data not available in comparable format for 1985.				167	6%
Household Boat					178	7%
Guide Services					0	0%
Licence Fees				24	226	9%
Other					33	1%
TOTAL				$268	$2,550	100%

CAMPING COMPONENT ANALYSIS

Crown Land Camper Survey

A Crown land camper survey was conducted by the Ministry of Natural Resources within the pilot study area during 1984 and 1985. This survey ran from approximately the middle of May to the end of September and included surveys of Ontario Residents, other Canadians, and non-residents of Canada.

Number of Contacts

Approximately 551 Ontario resident parties, 422 other Canadian parties, and 2,005 non-resident of Canada parties were contacted over two years for a total of 2,978 parties (Table 8). This equates to approximately 1,467 parties (6,194 individuals) during the 1984 survey and 1,511 parties (7,133 individuals) during the 1985 survey for a total of 1,978 parties contacted (13,327 individuals).

Location of Contacts

(i) Kenora District

Of the 964 parties contacted, 317 (33%) were contacted within the Highwind Lake area; 186 (19%) were contacted within the Whitedog/Caribou area; 157 (16%) were contacted within the Jones Road area; 73 (8%) were contacted on the English River; and the remaining 231 parties (24%) were contacted in scattered locations throughout the district.

The majority of Ontario residents and other Canadians were contacted within the Highwind Lake area while the majority of non-residents of Canada were contacted within the Jones Road area during the 1984 survey and within the English River area during the 1985 survey. The Jones Road area became a regulated camping zone on January 1, 1985.

(ii) Dryden District

Of the 154 parties contacted, 21 (14%) were contacted within the Dore Lake area; 19 (12%) were contacted within the Meglund Lake area; 19 (12%) were contacted within the Meglund Lake area; 19 (12%) were contacted within the Camp 61 and 69 area; and the remaining 95 parties (62%) were contacted in scattered locations throughout the district.

The majority of Ontario residents were contacted within the Meglund Lake area while both other Canadians and non-residents of Canada did not appear to concentrate in any one area of the district.

TABLE 8

Number of Contacts (1984)

District	Resident	Other Canadian	Non-Resident of Canada	Total
Kenora	101	150	241	492
Dryden	44	5	41	90
Ignace	67	2	188	257
Sioux Lookout	22	1	138	161
Red Lake	19	8	32	59
Fort Frances	19	5	188	212
Atikokan	46	9	141	196
Total	318	180	969	1,467

Number of Contacts (1985)

District	Resident	Other Canadian	Non-Resident of Canada	Total
Kenora	87	228	157	472
Dryden	10	3	51	64
Ignace	42	1	157	200
Sioux Lookout	29	6	216	251
Red Lake	5	0	18	23
Fort Frances	46	3	217	266
Atikokan	14	1	220	235
Total	233	242	1,036	1,511

TOTAL: 2,978

Ignace District

Of the 457 parties contacted, 189 (42%) were contacted within the Camp 325 Road area; 107 (23%) were contacted within the Press Lake area; and the remaining 161 parties (35%) were contacted in scattered locations through the district.

Sioux Lookout District

Of the 412 parties contacted 156 (38%) were contacted within Zone G - Hwy. 599/Camp 702 Road area; 84 (20%) were contacted within Zone C - Hwy. 642 area; 58 (14%) were contacted within Zone E - Vermilion River Road area; and the remaining 114 parties (28%) were contacted in scattered locations throughout the district.

The majority of non-residents of Canada were contacted within Zone G - Hwy. 599/Camp 702 Road area while both other Canadians and Ontario residents did not indicate a preference.

Red Lake District

Of the 82 parties contacted, 17 (21%) were contacted within the Longlegged Lake area; 16 (20%) were contacted within the Red Lake area; 14 (17%) were contacted within the Nungesser Road area; and the remaining 35 parties (43%) were contacted in scattered locations throughout the district.

All three user groups (residents, other Canadians and non-residents of Canada) did not appear to concentrate in any one area of the district.

Fort Frances District

Of the 478 parties contacted, 275 (57%) were contacted within the Rainy Lake zone, 110 (23%) were contacted within the Penassi Road area; and the remaining 93 parties (20%) were contacted within scattered locations throughout the district.

Both Ontario residents and other Canadians did not appear to concentrate in any one area of the district while the majority of non-residents of Canada were contacted within the Rainy Lake and Penassi Road areas during the 1984 survey and largely on Rainy Lake during the 1985 survey. The Penassi Road system became a regulated camping zone on January 1, 1985.

Atikokan District

Of the 431 parties contacted, 208 (48%) were contacted within Zone 3 - Sapawe area; 154 (36%) were contacted within Zone 2 - Bending Lake Road area; and the remaining 69 parties (16%) were contacted within Zone 1 - Flanders area.

The majority of Ontario residents were contacted within Zone 2 - Bending Lake Road area while the majority of both other Canadians and non-residents of Canada were contacted within Zone 3 - Sapawe Road area.

Origin of Campers

For the most part, the majority of Ontario residents contacted within each district had as their place of origin, the major town or community located within that district. The majority of other Canadians that were contacted came from Manitoba, and almost exclusively from the city of Winnipeg. Of the total number of non-residents of Canada surveyed, almost one-half reported their place of origin as being the state of Minnesota (921 parties or 46%). The second most common state of origin was reported to be Wisconsin (557 parties or 28%) followed by the states of Illinois and Iowa respectively. The origins of Crown land campers remained relatively consistent during the two year survey period.

Type or Group

Approximately 45 percent of all parties contacted were classified as groups, 27 percent were families; 17 percent were couples; and 11 percent were classified as singles. This breakdown did not appear to vary greatly amongst the three survey audiences (Ontario resident, other Canadian, and non-resident of Canada) or during the two year survey period.

Principle Type of Accommodation Unit Utilized

The principle type of accommodation unit utilized did not change significantly during the two year survey. Approximately 43 percent of all parties contacted utilized a tent for accommodation purposes; 19 percent utilized a truck camper; 10 percent utilized a travel trailer; 9 percent utilized a motor home; 9 percent utilized a houseboat; 5 percent utilized a tent trailer; and 5 percent utilized another form of accommodation unit to camp on Crown land in Northwestern Ontario.

Average Party Size

During the 1984 Crown land camping survey, the average party size of Ontario resident contacts was found to be approximately 4.3, while the average party size for other Canadians was 3.6 and the average party size for non-residents of Canada was found to be 4.2 individuals per party. During the 1985 survey, the average party size remained relatively consistent with a 4.2, 5.2*, and 4.7 average for Ontario residents, other Canadians, and non-residents of Canada respectively.

* Includes 3 parties of 20 individuals, 2 parties of 30 individuals and 1 party of 100 individuals without which the average party size would be 4.3.

Age Distribution

The age distribution of Ontario residents contacted was as follows:

23 percent were found to be 16 years of age or younger while 77 percent were 17 years of age or older. The age distribution of other Canadians was found to be as follows: 19 percent were 16 years of age or younger, while 81 percent were 17 years of age or older. The age distribution of non-residents of Canada was found to be as follows: 15 percent were 16 years of age or younger while 85 percent were 17 years of age or older. The age distribution of all three survey groups did vary significantly during the two year survey period.

Main Reason for Trip

During the 1984 Crown land camping survey, Ontario residents indicated that fishing and camping were the main reasons for their trip. During the 1985 survey, approximately 45 percent of Ontario residents indicated that camping was the main reason for their trip, followed by fishing (38 percent).

During the 1984 Crown land camping survey, other Canadians indicated that fishing and camping were the main reasons for their trip. During the 1985 survey approximately 58 percent of other Canadians indicated that camping was the main reason for their trip, followed by fishing (24 percent).

During the 1984 Crown land camping survey, non-residents of Canada indicated that fishing and camping were the main reasons for their trip. This remained consistent during the 1985 survey with 88 percent of non-residents indicating that fishing was the main reason for their trip, followed by camping (8 percent).

All three user groups indicated a number of other main reasons for trips including such activities as hunting, canoeing, boating, relaxation, photography, swimming, etc. These activities comprised an insignificant amount of total number of reasons indicated for taking a camping trip.

Length of Stay on Crown Land

During the 1984 survey, other Canadians stayed an average of 4.2 nights on Crown land while non-residents of Canada stayed an average of 5.4 nights on Crown land. The average length of stay on Crown land did not change significantly during the second year of the survey with an average of 4.2 nights for Ontario residents; 3.7 nights for other Canadians; and 4.9 nights for non-residents of Canada.

Regulation Compliance

The non-resident of Canada compliance rate regarding the new Crown land camping regulations are summarized within Table 9. During the initial year of the pilot program there was a 30 percent violation rate followed by 14 percent during 1985 and 17 percent during 1986. Enforcement efforts were largely directed towards public relations during the first year in an attempt to educate the non-resident Crown land camper.

TABLE 9

Non - Resident of Canada

Crown Land Camping Permit Compliance

1984 - 1986

YEAR	NO. OF CONTACTS	WARNINGS	CHARGES	VIOLATION RATE	CHARGE RATE
1984	4,041	1,210	1	30%	< 1%
1985	4,845	501	197	14%	4%
1986	2,344	179	214	17%	9%
TOTAL	11,230	1,890	412	21%	4%

Regulation Awareness

Approximately 67 percent of the total number of non-residents of Canada surveyed during both 1984 and 1985 were aware of the new program regulations. The means by which non-residents learned of the new regulations remained relatively consistent during the two-year survey period (Table 10). In summary (1984 and 1985 combined), of the total number of non-residents of Canada aware of the new regulations, 21 percent learned of these regulations through some form of advertisement (radio, T.V., newspaper); 34 percent through a licence issuer; 2 percent through a tourist information centre; 14 percent through and M.N.R. office; 12 percent through a friend/relative; 6 percent through a sport show; and 11 percent learned of these regulations through other means.

Opinion of New Program Regulations

(i) Ontario Residents

During the 1984 Crown land camping survey, approximately 46 percent of Ontario residents surveyed felt that the new program regulations were very acceptable; 35 percent felt that they were acceptable; 13 percent felt that modifications were required; 2 percent felt that these new regulations were unacceptable; and 4 percent did not express an opinion (Table 11).

The opinions expressed by Ontario residents during the 1985 survey did not vary greatly from those expressed during the 1984 survey. Approximately 45 percent of Ontario residents indicated that the new program regulations were very acceptable; 42 percent indicated that they were acceptable; 9 percent indicated that modifications were required; 1 percent indicated that these new regulations were unacceptable; and 3 percent did not express an opinion.

The most frequent responses in terms of modifications to the program remained fairly consistent during the two year survey. These responses included: increase the camping fee for non-residents of Canada; include all non-residents of Ontario in the program; and provide better services for the fees charged. During both the 1984 and 1985 survey, a small number of Ontario residents indicated that the new program regulations were unacceptable because they felt it discriminated against non-residents of Canada.

(ii) Other Canadians

During the 1984 Crown land camping survey, approximately 17 percent of other Canadians surveyed expressed that the new program regulations were very acceptable; 48 percent felt that they were acceptable; 2 percent felt that modifications were required; 1 percent felt that they were unacceptable; and 32 percent did not express an opinion.

The opinions expressed by other Canadians during the 1985 survey did

Table 10

Regulation Awareness

(Non-Resident of Canada)

District	Advertisement		Licence Issuer		Tourist Info. Centre		MNR Office		Friend/ Relative		Sport Show		Other		Total	
	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985
Kenora	133	30	185	47	16	3	80	13	32	11	49	11	31	9	526	124
Dryden	18	12	40	76	2	15	75	-	11	12	6	12	9	8	161	135
Ignace	119	144	249	197	16	-	80	87	94	106	22	51	2	31	582	616
Sioux Lookout	95	63	196	393	-	-	86	221	92	63	32	27	4	16	505	783
Red Lake	6	-	28	42	-	17	3	-	24	-	19	9	6	13	86	81
Fort Frances	153	293	201	203	34	11	44	72	61	27	3	45	83	405	579	1056
Atikokan	118	56	67	74	4	3	34	23	160	17	50	12	71	11	504	196
TOTAL	642	598	966	1032	72	49	402	416	474	236	181	167	206	493	2943	2991
PERCENTAGE	22	20	33	35	2	2	14	14	16	8	6	5	7	15	100	100

Table 11

Opinion of New Program Regulations

User Group	Very Acceptable %		Acceptable %		Modifications Required %		Unacceptable %		Undecided %	
	1984	1985	1984	1985	1984	1985	1984	1985	1984	1985
Resident	46	45	35	42	13	9	2	1	4	3
Other Canadian	17	11	48	70	2	3	1	3	32	13
Non-Resident of Canada	10	7	47	66	30	17	9	9	4	1
OVERALL PERCENTAGE	19	13	44	64	23	13	6	6	8	4

not vary substantially from those expressed during the 1984 survey. Approximately 11 percent of other Canadians expressed that the new program regulations were very acceptable; 70 percent indicated they were acceptable; 3 percent indicated that they were unacceptable; and 13 percent did not express an opinion.

The most frequent response in terms of modifications to the program was that regulated camping areas are too numerous and restrictive.

(iii) Non-Residents of Canada

During the 1984 Crown land camping survey, approximately 10 percent of non-residents of Canada surveyed expressed that the new program regulations were very acceptable; 47 percent indicated that they were acceptable; 30 percent indicated that modifications were required; 9 percent indicated that they were unacceptable; and 4 percent expressed no opinion.

The opinions expressed by non-residents of Canada during the 1985 survey were somewhat different from those expressed during the 1984 survey. Approximately 7 percent of non-residents of Canada felt that the new program regulations were very acceptable; 66 percent felt that they were acceptable; 17 percent indicated that there should be modifications made to the program; 9 percent felt that the new regulations were unacceptable; and 1 percent did not express an opinion.

The most frequent responses given in terms of modifications to the program remained consistent during the two-year survey and included: a group or vehicle fee would be preferred; provide better services for fee charged; reduce the number of regulated camping zones; and better publicize the new regulations. For those individuals indicating that the new regulations were unacceptable, the reasons given included: the new regulations are discriminatory; and the fee is too excessive for the services provided.

Camped on Crown Land Within Study Area Last Year

Approximately 89 percent of Ontario residents surveyed during 1985 indicated that they had camped within the study area last year. The average number of previous years camped was approximately 8 years.

Approximately 83 percent of other Canadians surveyed during 1985 indicated that they had camped within the study area last year. The average number of previous years camped was approximately 6 years.

Approximately 73 percent of the total number of non-residents of Canada surveyed during the 1985 survey indicated that they had camped within the study area last year. The average number of previous years camped was approximately 6 years.

Return Visit To Northwestern Ontario In Future

The percentage of other Candians and non-residents of Canada who indicated that they planned a return visit to Northwestern Ontario sometime in the future remained almost consistent during the two-year survey period (Table 12).

Approximately 88 percent of non-residents of Canada surveyed during 1985 indicated they planned on a return visit; 6 percent indicated that they did not plan on a return visit; and 6 percent indicated that they were undecided.

Summary Of Observations

The results of this two-year survey indicate that for the most part, the new Crown land camping regulations are acceptable to both residents and non-residents. Almost 90 percent of the non-residents of Canada surveyed indicated that they plan on a return visit to Northwestern Ontario in the future. Both resident and non-resident campers appear to recognize the need to better regulate the number of campers in certain Crown land areas, to prevent crowding and over-use of campsites, to improve the quality of campers' outdoor experience and, in some cases, distribute anglers more widely to prevent over-fishing on some waters.

Table 12

Return Visit to Northwestern Ontario in Future

User Group	Yes %		No %		Undecided %	
	1984	1985	1984	1985	1984	1985
Other Canadian	95	94	5	4	-	2
Non-Resident of Canada	84	88	10	6	6	6
OVERALL PERCENTAGE	90	90	7	5	3	5

Regulated Camping Zone Evaluation

Regulated Crown land camping zones are zones in which non-residents of Canada are required to camp at commercial campgrounds or provincial parks. The rationale for the establishment of such zones include:

- Areas that are under stress from a fisheries perspective. These areas can include both warm or cold water lakes that are being over harvested.

  One of the assumptions for the establishment of this type of zone is that a significant portion of the angling effort comes from non-resident Crown land campers. For the most part, many zones established to assist in fisheries management within the Northwestern Region contain lake trout lakes (exception - Lac Seul/ English River).

- Areas that have a high concentration of existing tourist establishments.

  Free and unrestricted camping on Crown lands within these zones causes unfair competition to the existing tourist industry. One of the objectives of the program is to increase the benefits to the tourist industry. The establishment of a zone in this type of area encourages non-resident Crown land campers to utilize the services offered by the private sector.

- Areas that are experiencing congestion and competition between residents and non-residents for Crown land resources.

  This competition could include camping resources, angling resources and other recreational resources.

- Areas that are fly-in wilderness tourism areas but will be or are accessed via forest access roads.

  The establishment of a regulated zone in these areas offers some protection to the existing tourist operators against fishing pressure from non-resident Crown land campers.

In an attempt to evaluate the effectiveness of regulated camping zones, approximately 100 accommodation-based tourist operators (lodges, campgrounds, cabins, etc.) were interviewed during 1985. These operators are located within or adjacent to regulated camping zones and were asked a number of questions, the results of which are summarized within Figures 6, 7 and 8. Operators were interviewed in view of their experience in these zones and to assess their perception of how the program was working.

Figure 6 indicates that 83 operators (83%) had some magnitude of increase in business status during 1985 while 17 operators (17%) indicated a decrease in business.

Figure 7 indicates that of the 83 operators who experienced an increase in business status during 1985, approximately 46 operators (55%) attributed some portion of this increase to the presence of the regulated camping zone while the remaining 37 operators (45%) perceived their increase in business to be attributable to other factors (ie return visitation, marketing, etc.).

Figure 8 indicates that 73 operators (73%) perceived that there had been some reduction in fishing pressure since the establishment of the regulated camping zone while 27 operators (27%) perceived no reduction had occurred.

In the minds of the tourist operators in the field, it would appear that regulated camping zones are achieving the objectives for which they were established - reduce fishing pressure, increase benefits to the tourist industry, and reduce competition between residents and non-residents for Crown land recreation resources.

FIGURE 6

REGULATED CAMPING ZONE EVALUATION

ACCOMMODATION - BASED TOURIST OPERATOR INTERVIEWS

TOURISM BUSINESS STATUS DURING 1985

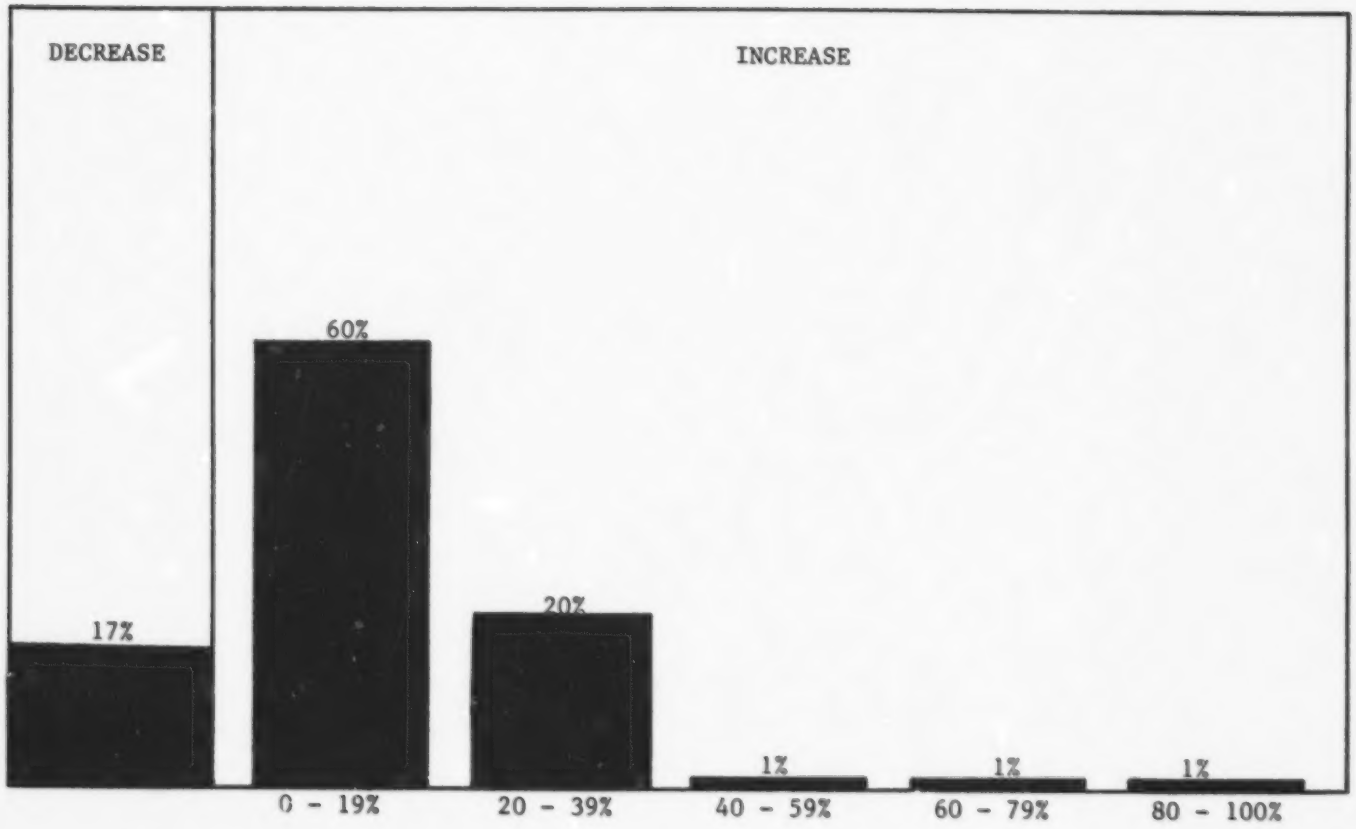


FIGURE 7

REGULATED CAMPING ZONE EVALUATION

ACCOMMODATION - BASED TOURIST OPERATOR INTERVIEWS

AMOUNT OF BUSINESS INCREASE ATTRIBUTABLE TO REGULATED CAMPING ZONE

(Operators who experienced a Business Increase During 1985 only)

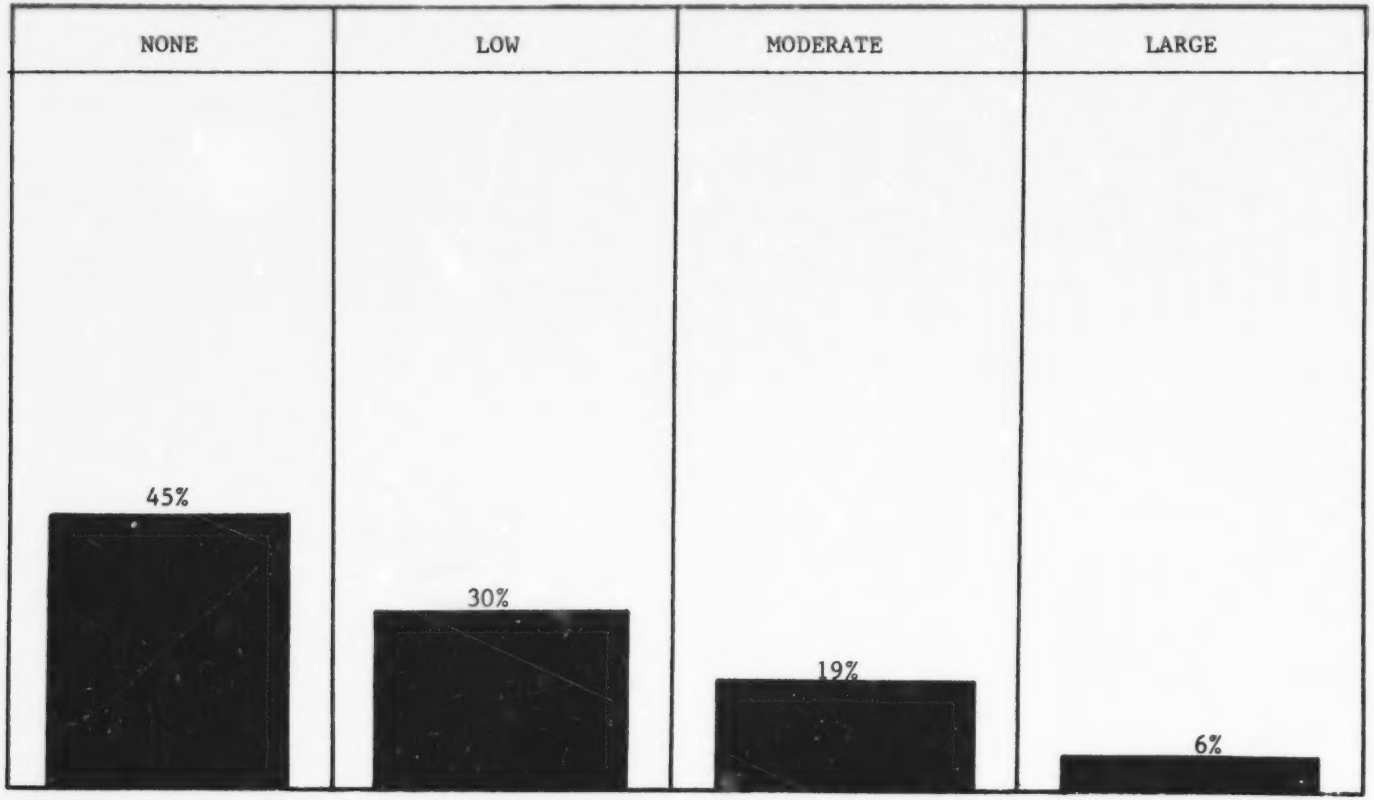
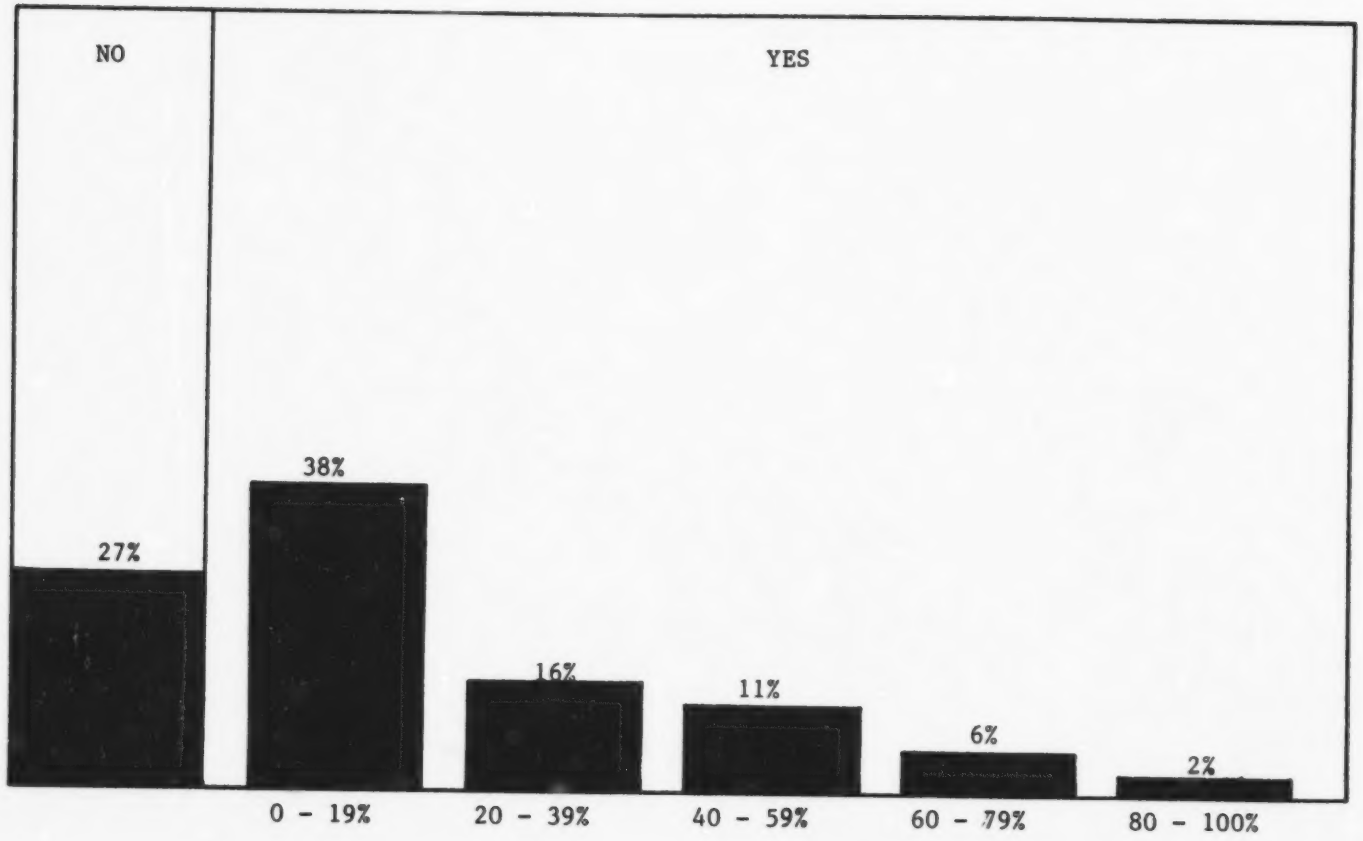


FIGURE 8

REGULATED CAMPING ZONE EVALUATION

ACCOMMODATION - BASED TOURIST OPERATOR INTERVIEWS

DEGREE OF FISHING PRESSURE REDUCTION



Privatization

As part of the camping component of the Crown Land Recreation Pilot Program, a number of popular camping sites were offered to the private sector to operate as new business opportunities. The selection of sites, proposed development, and the awarding of the tenders were undertaken in association with the Ministry of Tourism and Recreation.

Tables 10 and 11 summarize the number of sites privatized to date and indicate the date the site was issued and the current land tenure of the site. Twenty four sites (six day use only) have been privatized within the Northwestern Region and Atikokan District to date. Approximately $252,000 have been invested with some 7,600 clients generating $190,000 in revenue during 1986.

In general, the privatization of the popular camping sites has increased the benefits to the tourist industry and reduced competition between residents and non-residents for Crown land recreation resources. It is anticipated that private sector investment in these sites will continue and that annual revenues have the potential to increase as sites are more fully developed.

TABLE 13

PRIVATIZATION SUMMARY

NAME OF SITE	DATE ISSUED	TENURE
HAVIK LAKE	NOV., 1984	L.U.P.
SEPARATION NARROWS	JUNE, 1985	L.U.P.
HIGHWIND LAKE LODGE	MAY, 1984	L.U.P.
ANDERSON'S SILVER LAKE LODGE	FEB., 1984	L.U.P.
PRESS LAKE	OCT., 1985	L.U.P.
TIMBER WOLF LODGE	JAN., 1984	CROWN LEASE
WENASAGA	MAY, 1984 DAY-USE ONLY	L.U.P.
ENGLISH RIVER		
GOLDPINES		
MANITOU		
LITTLE BEAR		
STORMER LAKE		
LAC SEUL (10 SITES)	JAN., 1985	L.U.P.
FINLAYSON LAKE	NOV., 1983	L.U.P.
McCAULEY LAKE	MAY, 1985	L.U.P.

TABLE 14

1986 SUMMARY
PRIVATIZATION OF POPULAR CROWN LAND
CAMPING SITES

NUMBER OF SITES: 24 SITES (6 SITES - DAY USE ONLY)

AMOUNT OF FUNDING INVESTED TO DATE: $252,000

NUMBER OF CLIENTS DURING 1986: 7,600

AMOUNT OF REVENUE GENERATED DURING 1986: $190,000

ADDITIONAL PEOPLE EMPLOYED OTHER THAN OWNERS: 10 SEASONAL

TOTAL LENGTH OF EMPLOYMENT: 50 MAN MONTHS

NET ECONOMIC IMPACT OF PROGRAM

Actual/Projected Revenues

The introduction of the Crown land camping program had the potential to impact non-resident Crown land campers in four general ways:

1 - All of the Crown land camping anglers would continue to come to the Northwestern Region and camp on Crown land;

2 - All of the Crown land camping anglers would continue to come to the Northwestern Region and a portion of these anglers would now utilize the services provided by the commercial tourist sector;

3 - A portion of the Crown land camping anglers would not return to the Northwestern Region; and

4 - A combination of all of the above.

In all likelihood, what did happen was a combination of all of the above. That is, some Crown land camping anglers stayed home, some returned to camp on Crown land and pay the camping fee, and some elected to utilize the services provided by the commercial tourist industry.

From the sale of Crown land camping permits (Table 15), we know that revenues in the amount of approximately $203,000 and $176,000 were generated during 1984 and 1985 respectively. On average, this equates to approximately $190,000 per annum over the two year period. In addition, we know from our analysis of the privatization initiative that the commercial tourist industry received approximately $190,000 in camping fees for these privatized sites during 1986. Therefore, actual minimum economic benefits from the program are approximately $400,000 per annum (Table 16).

From the analysis of the Non-Resident Provincial Angler survey, we know that there were approximately 12,100 Crown land camping anglers within the Northwestern Region during 1983. We also know that this number declined to 9,500 during 1985. If we assume that all of the Crown land camping anglers returned to the Northwestern Region during 1985, then approximately 2,600 anglers must have utilized the services of the commercial tourism industry. We also know from the analysis of the non-resident angler survey that anglers utilizing the services of the tourism industry spent on average approximately $476 per trip while Crown land camping anglers spent on average approximately $208 per trip during 1984. Assuming that the 2,600 previous Crown land camping anglers now had expenditures on par with anglers utilizing the tourism industry (net difference of $286), this would result in a maximum gross economic benefit of approximately $700,000. Added to this amount are the fees collected from the sale of Crown land camping permits ($190,000) which results in a maximum gross economic

TABLE 15

CROWN LAND CAMPING PERMIT SALES

1984 - 1986

YEAR	PERMIT TYPE		
	INDIVIDUAL	FAMILY	REVENUE
1984	48,226	11,718	$203,638
1985	45,318	7,981	$175,859
1986*	38,048	7,175	$150,019
TOTAL	131,592	26,874	$529,146

* To the end of November only.

TABLE 16

ECONOMIC OVERVIEW

COSTS AND REVENUES GENERATED

Cdrown Land Camping Program

COSTS

(000's)

YEAR	OPER.	EVAL.	TOTAL
1983/84	160.0	156.0	316.0
1984/85	150.0	226.0	376.0
1985/86	108.0	254.0	362.0
1986/87	56.0	171.0	227.0
TOTAL	474.0	807.0	1,281.0

* Ongoing costs for the operation of the program within the Northwestern Region is $50,000.00 for 1987/88.

REVENUE GENERATED PER ANNUM

1. Known Revenue (minimum)

- Crown Land Camping Fee	190,000
- Privatized site fee	190,000
TOTAL	380,000

2. Projected Revenue (maximum)

Crown land Campers (tourist industry)	2,600
Avg. expenditure difference (Crown, tourist)	x 268
	696,800
Crown Land Camping Permit Fee	190,800
	886,800

3. The gross economic benefit of the Crown land camping program lies somewhere between approximately 400,000 - 900,000 dollars per annum.

projection of approximately $900,000. Given that it is unlikely that all of the 2,600 previous Crown land camping anglers are now utilizing accommodations provided by the commercial tourist industry, we can realistically estimate the gross economic benefit of the program to lie somewhere between $400,000 - $900,000 per annum.

Costs of Program Implementation/Evaluation

As indicated within Table 16, the costs for the implementation and evaluation of the three-year Crown land camping pilot program was approximately 1.3 million dollars. This cost can be broken down into approximately .5 million for the operation and implementation aspects of the program and .8 million for the evaluation of the impacts of the program. Operational and implementation costs included a communications package - printing of brochures, maps, permits, etc., signage to advertise regulated camping zones and the program in general, extra clerical staff in two districts and the hiring of nine deputy conservation officers (DCO) during 1984 and 1985 and seven DCO's during 1986. The primary responsibilities of the DCO's were to assist conservation officers in the public relations, evaluation and enforcement of the new camping regulations.

Evaluation costs included the non-resident provincial angler survey during 1983 and 1984, creel surveys on Lake of the Woods and Rainy Lake from 1983 to 1986, and the Crown land camper survey (1984-1985).

SUMMARY

In summary, the three year Crown land camping pilot program has achieved its intended objectives through the following:

1. The establishment of the magnitude of Crown land camping use within the Northwestern Region.

   Prior to the pilot program, estimates varied greatly as to the number of non-resident of Canada Crown land campers within the study area. We now know that this user group constitutes less than five percent (9,500 during 1985) of the total number of non-resident anglers within the study area.

2. The establishment of the principles of user pay - even basic services on Crown land cost money.

   Prior to the pilot program, there was indiscriminate free camping on Crown lands within the study area. The provision of even basic services such as roadway and parking lot maintenance and garbage collection cost the Ministry significant amounts. The establishment of the non-resident of Canada Crown land camping fee attempts to more equitably distribute the cost of providing quality recreation opportunities on Crown lands to all users.

3. By increasing the economic benefits to the existing tourist industry.

   The charging of a fee to camp on Crown land eliminated the unfair competition between camping opportunities offered by the tourism industry and opportunities on adjacent Crown lands. In addition, the disposition of popular camping sites to the private sector to operate as new business opportunities increased private sector earning potential. The establishment of regulated Crown land camping areas also encouraged previous Crown land campers to utilize the services offered by the tourist industry.

4. By reducing the less economic use of the resource and by increasing tourist expenditures within the Region.

   From the analysis of the Non-Resident Provincial Angler Survey and from the sale of Crown land camping permits we know that we have decreased the number of non-resident Crown land campers and increased expenditures for this user group.

5. By recognizing the priority that government places on the resident use of all resources by reducing competition and congestion.

   Prior to the implementation of the program, competition and congestion occurred at many local camping areas. The introduction of the non-resident of Canada Crown land camping fee and the establishment of regulated camping zones helped to reduce this competition and congestion for resources.

6. The resolution of many locally sensitive resource management concerns.

   For example, the lake trout fishery on Whitefish Bay of Lake of the Woods was being over-harvested. The establishment of this area as a regulated camping zone has helped in reducing the angling pressure on the lake trout population. In another example, the establishment of the Highwind Lake area within Kenora District as a regulated camping zone has reduced the competition and congestion for Crown land camping and angling opportunities between residents and non-residents.

7. Lastly, by increasing our effectiveness in the management of fish and wildlife resources (the new Crown land camping regulations are an effective management tool).

   A number of regulated camping zones have reduced the angling pressure on sensitive fisheries - lake trout and muskellunge within the Region.

RECOMMENDATIONS

1. That the non-resident Crown land camping permit be continued within the Northwestern Region and be expanded to include the remaining three Northern Regions effective January 1, 1988.

2. That the establishment of regulated Crown land camping zones proceed on a case by case basis with careful consideration being given to the need for and utility of each zone prior to implementation. In addition, regulated zones should be advertised for one year prior to implementation.

3. That the privatization of popular non-resident Crown land camping areas proceed on a case by case basis with consideration being given to local resident use of the area.